The California Closets Digital Showroom App User's Manual

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Purpose of the California Closets Digital Showroom

With Digital Showroom, we are trying to provide Design Consultants with an electronic interactive portfolio that is customizable to the business that each franchise has. Digital Showroom is intended to allow Design Consultants to work with clients on multiple levels:

- As inspirational brochure-ware potentially replacing the need to carry heavy and expensive presentation binder along on calls
- As a workbook and sample book to use with clients in deciding on options and extras for their clients
- As a self-guided tool clients can browse maintaining their focus while the Design Consultant is measuring or using ClosetCAD
- As a means to effectively follow-up with information that the client specifically shows an interest in during the appointment
- As a means for the local franchise to 'set the story' of their business and the products they sell

With Digital Showroom on the iPad and ClosetCAD on a laptop, Design Consultants will have everything they need to excel in sales in an exciting way.

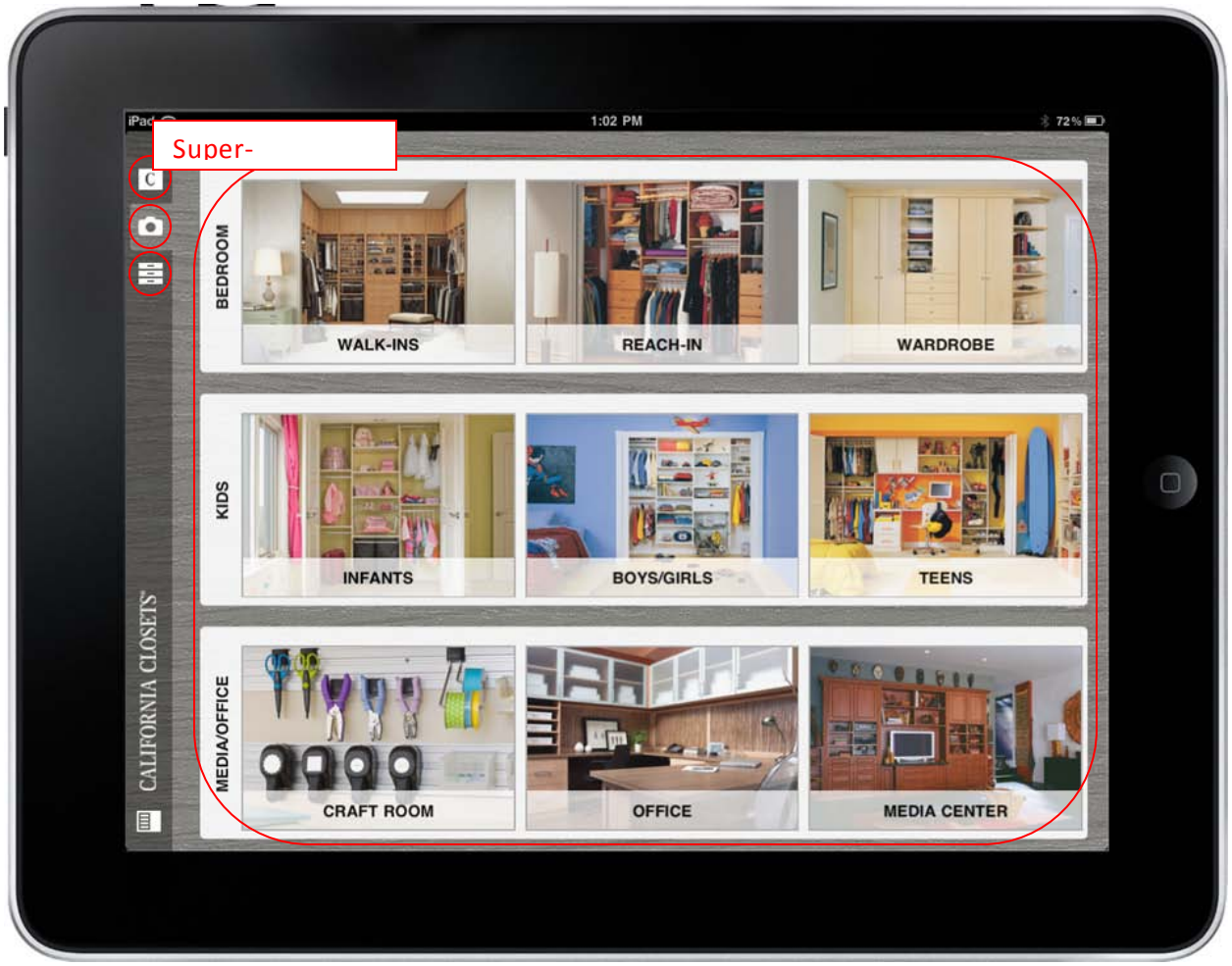
Basics

To start out, there are a couple of basics to understand. The first is a set of terms we've developed as we designed and built this app. Knowing these will make understanding the rest of the documentation easier. Second is the set of requirements that you should be aware of before using the app.

Terms

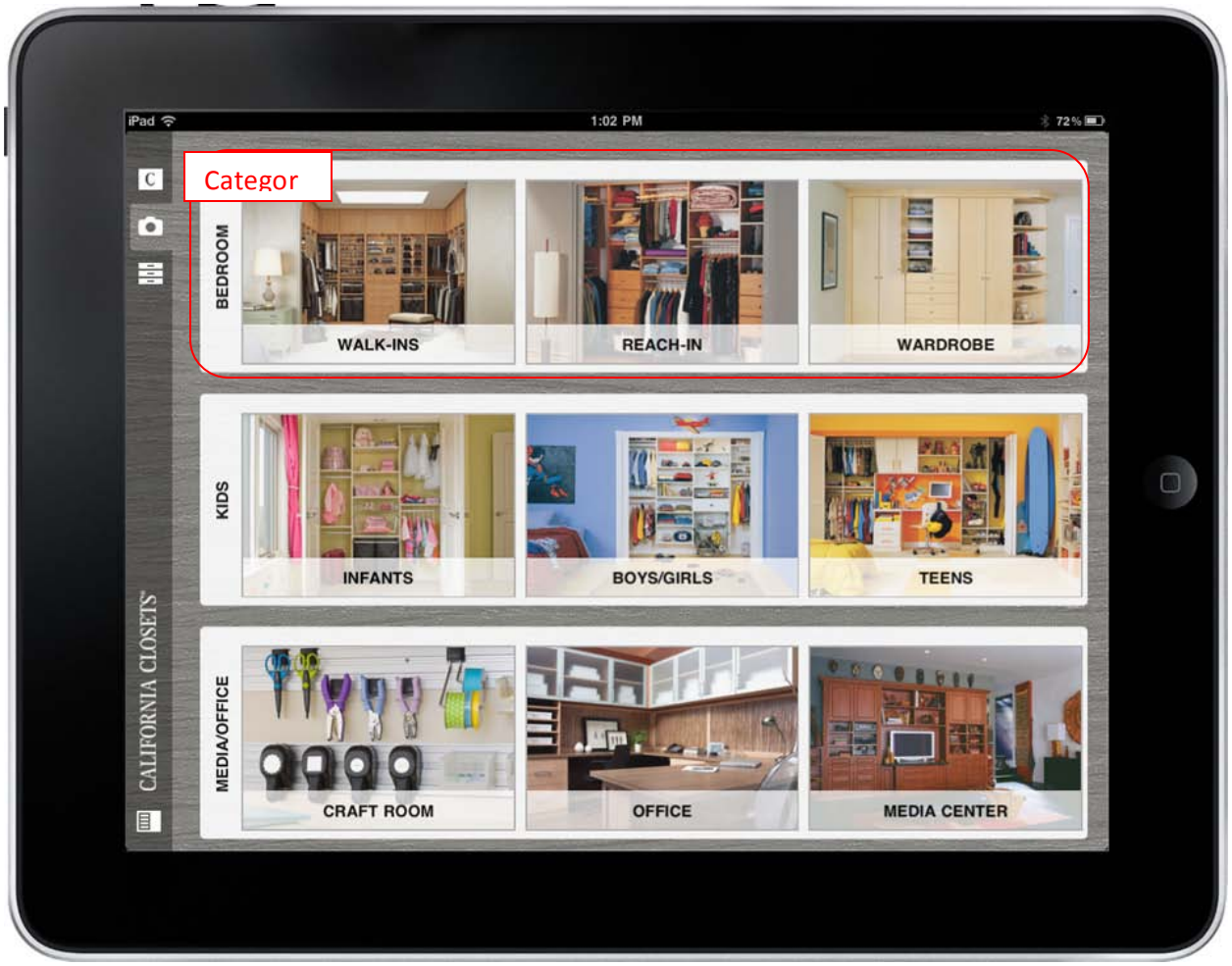
Super-Category

There are three super-categories in the Digital Showroom. They are "Our Difference", "Galleries", and "Products". These three super-categories are always there and you can get to them directly from the main navigation. "Our Difference" is intended to provide information about your franchise or California Closets in general. "Galleries" is intended to show off our work and provide inspiration to your customers. And, finally, "Products" provides examples of options and add-ons that are available in your franchise.



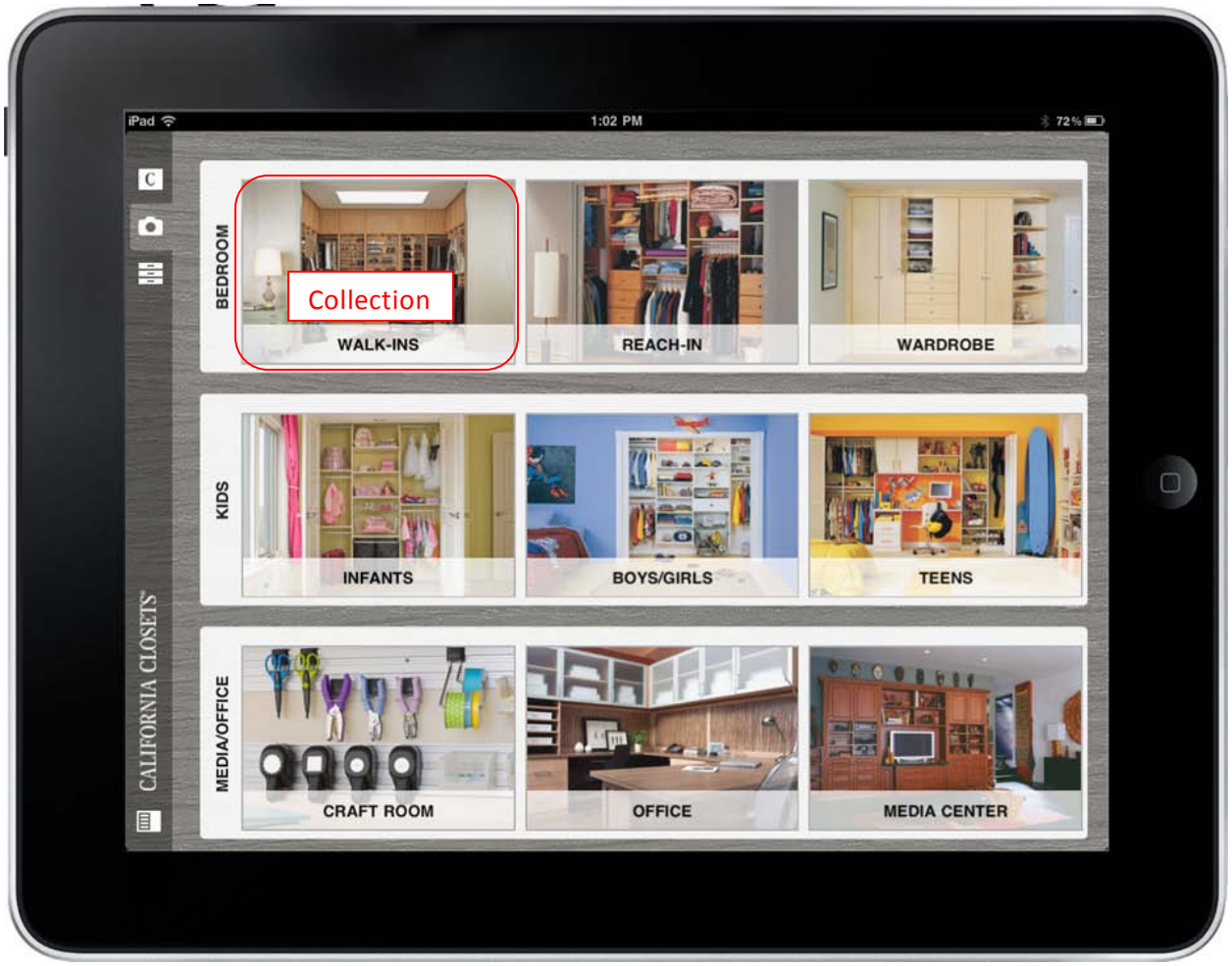
Category

A category is a grouping of collections (see below) that are tied together with a theme in a horizontal navigation group. An example of a category could be “Bedroom” which contains the collections “Walk-ins”, “Reach-ins” and “Wardrobe”.



Collection

A collection is a collection of pages, or images. A collection could be a group of images showing "Walk-ins" or "Finishes".



Page

A page is the term that we've given the actual image. A page that shows an image, say of a beautiful walk-in closet, contains also the title of the image and probably a description of that closet. It may also contain a document with more information about the image. Examples of this will be shown below.

iPad
11:20 AM
Page
Walk-In Closet
Suite System in Cognac
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin et odio eu augue pellentesque aliquam a sit amet libero. Phasellus tristique pulvinar pretium.
CALIFORNIA CLOSETS

Requirements and Recommendations

To use this application you will need an iPad (1 or 2). That's it! Other than initial set-up and subsequent updates, you will not be required to even have a persistent network connection. This allows you to work at a client site that may or may not have network or cell access. You also do not need an iPad with 3G capability. You can use the full functionality of the Digital Showroom app with a wi-fi only iPad.

In order to fully use the "Favorites" function in the Digital Showroom app, you will need to have at least one email account set up on your iPad. For information on how to do this, please see the Apple help page at http://www.apple.com/support/ipad/assistant/mail/.

Getting the Digital Showroom App

Requesting an Account

The first step is requesting an account from your franchises Digital Showroom administrator. They will create an account for you in the Digital Showroom server, which will send you an email. This email will have a link which will take you to a page where you can set your own password. It is best to do this on your iPad because once you've set your password you will be taken to a page where you can download the application.

Downloading the Digital Showroom App

This is a simple process. If you already have your account and set your password, on your iPad, open the web browser and go to http://favorites.cloud2.californiaclosets.com . Once there, click on 'Home' or 'Download App'the 'Install' link. It will download the app to your iPad. Once that has downloaded, you're ready for the initial content download.

Initial Content Download

One thing to keep in mind when downloading the initial content or any subsequent updates, is that these downloads could contain hundreds of images totaling hundreds of megabytes. Because of this, a wi-fi connection is required for the initial download and any updates. Once you've made the updates, a 3G connection will be fine for any other activities in the Digital Showroom. To access a wi-fi connection, see the Apple help page at http://www.apple.com/support/ipad/assistant/wifi/.

Click on the "C" icon to start the Digital Showroom app.

This will start the Digital Showroom app and show you the login dialog box.

You will need to fill in all three fields to continue. The password is the one you've set using the link in the email. Once you press 'Submit', the app will start downloading all of the content. The first time, this will take quite a while, depending on the speed of your wireless internet connection. It's best to plug the iPad in and let it sit. The process will take anywhere between 30 minutes and several hours.

When it has finished, it will open the "Our Difference" super-category and you can begin to explore the application.

Using the Digital Showroom App

Logging In

Most of the time, the iPad should remember your login from the initial download, or unless you specifically log out. If you do need to log in, it is the same procedure as shown above in the initial download.

Category Navigation

When you open the Digital Showroom app for the first time you should be on the "Our Difference" screen. There are several things that you can do here.

On this page you can:

1. Slide the collections in one category from left to right. If there are more than three collections in a category, this is how you see the rest collections not shown on the screen. You'll notice an elastic snap at both ends of the collection slide.
2. Slide the categories up and down. If there are more than three categories in the super-category, this is how you see the other categories. You'll notice an elastic snap at the top and the bottom of the slide.
3. The "C" icon will always bring you back to the "Our Difference" screen, shown here. This left hand navigation is always present.
4. The "Camera" icon will always take you to the main "Gallery" screen.
5. The "Drawers" icon will always take you to the "Product" screen.
6. This is the "Quick" navigation button. It is an alternate way to get around the app that is a little bit quicker. It also provides access to the settings for the app. These are discussed below.
7. Clicking on a thumbnail will take you into that collection.

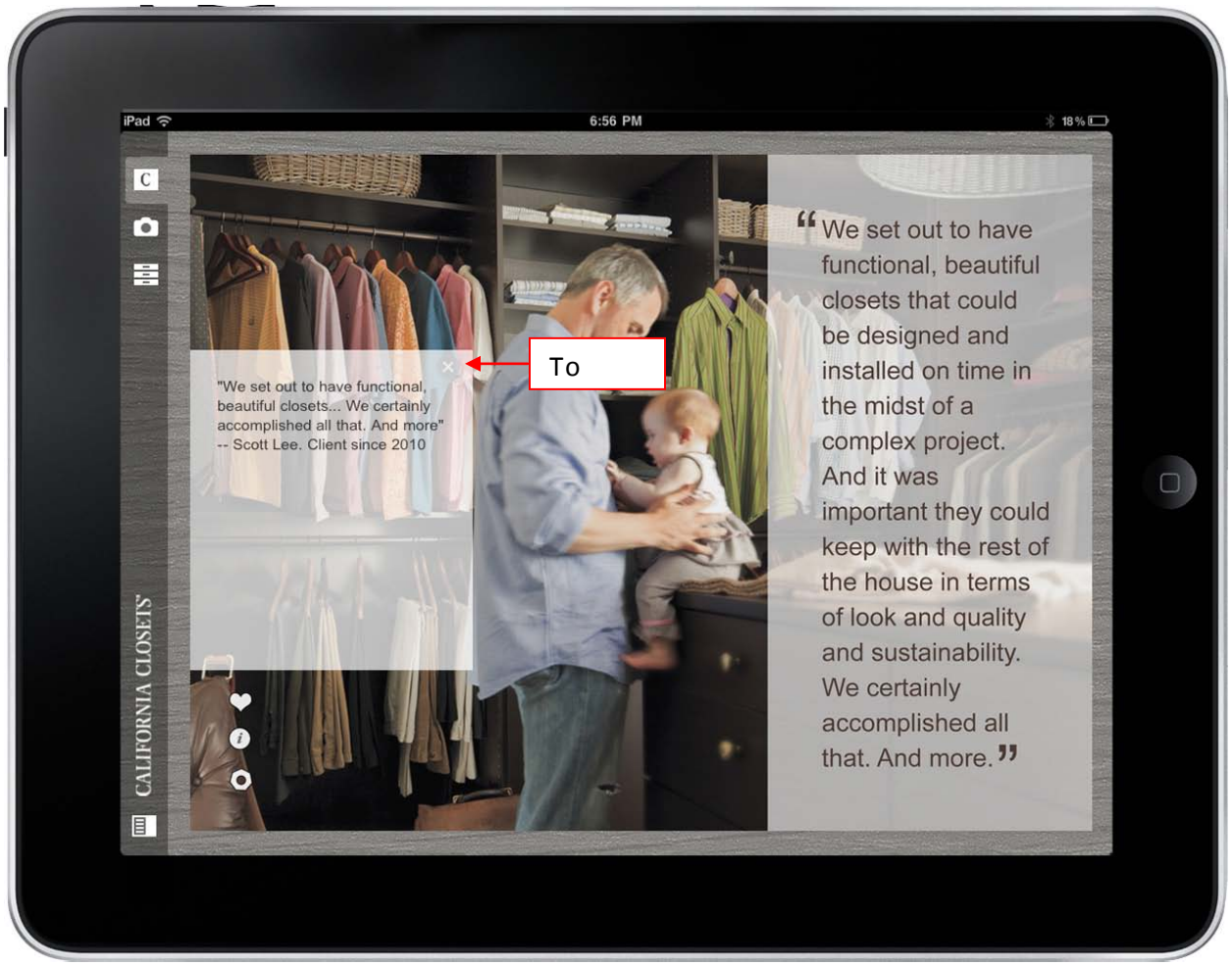
Collection Navigation

When you click on a thumbnail in the super-category screen, you will see a page in the collection.

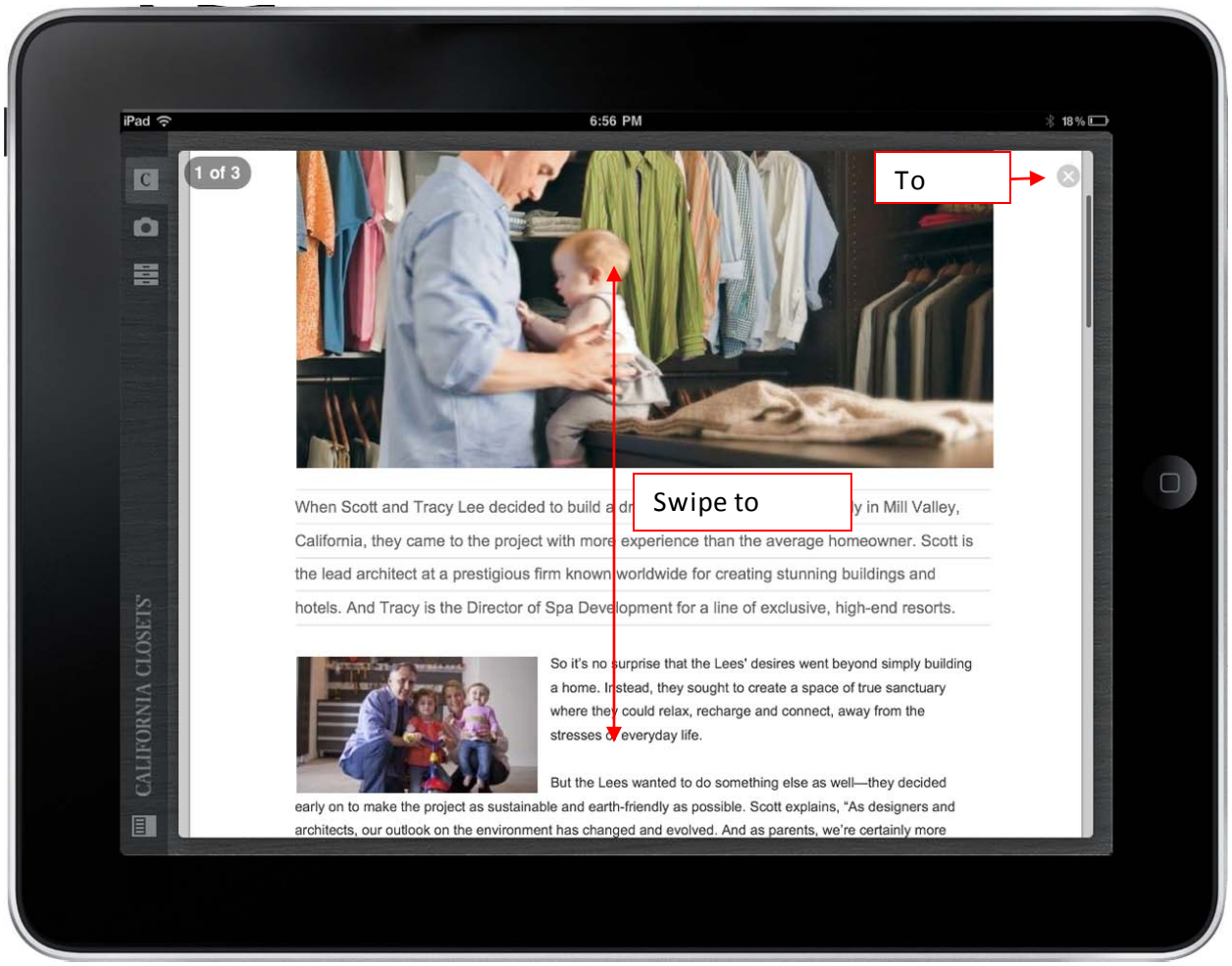
iPad
5:14 PM
45%
CALIFORNIA CLOSETS
"We set out to have functional, beautiful closets that could be designed and installed on time in the midst of a complex project. And it was important they could keep with the rest of the house in terms of look and quality and sustainability. We certainly accomplished all that. And more."
1
2
3
4
5
6

On this page you can:

1. Swipe the screen left or right to see the next or previous image. You'll see the elastic snap at the end of the collection.
2. This is the main navigation which will take you to the "Our Difference", "Gallery", or "Products" super-categories, and the Quick Navigation icon at the bottom.
3. This is the "Favorites" icon, that allows you and your customers to 'tag' a photo if they see something they especially like. This functionality is discussed on page 18. When an image has been 'favorited', this icon turns red.
4. The "i" icon will display info about the image in a box above the three page icons. You can close the info box with the "x" icon or swipe to the next image and the info box will close.


iPad
6:56 PM
18%
CALIFORNIA CLOSETS
"We set out to have functional, beautiful closets... We certainly accomplished all that. And more"
-- Scott Lee. Client since 2010
To
"We set out to have functional, beautiful closets that could be designed and installed on time in the midst of a complex project. And it was important they could keep with the rest of the house in terms of look and quality and sustainability. We certainly accomplished all that. And more."

5. Known as the “Tech Specs” icon, this will pop up more information in a PDF attached to the image. This will cover the entire app and you can scroll through the document. Once finish, tap on the “x” icon in the upper right corner to close the PDF and continue.


iPad
6:56 PM
18%
1 of 3
To
Swipe to
When Scott and Tracy Lee decided to build a dr
y in Mill Valley,
California, they came to the project with more experience than the average homeowner. Scott is
the lead architect at a prestigious firm known worldwide for creating stunning buildings and
hotels. And Tracy is the Director of Spa Development for a line of exclusive, high-end resorts.
So it's no surprise that the Lees' desires went beyond simply building
a home. Instead, they sought to create a space of true sanctuary
where they could relax, recharge and connect, away from the
stresses of everyday life.
But the Lees wanted to do something else as well—they decided
early on to make the project as sustainable and earth-friendly as possible. Scott explains, "As designers and
architects, our outlook on the environment has changed and evolved. And as parents, we're certainly more
CALIFORNIA CLOSETS

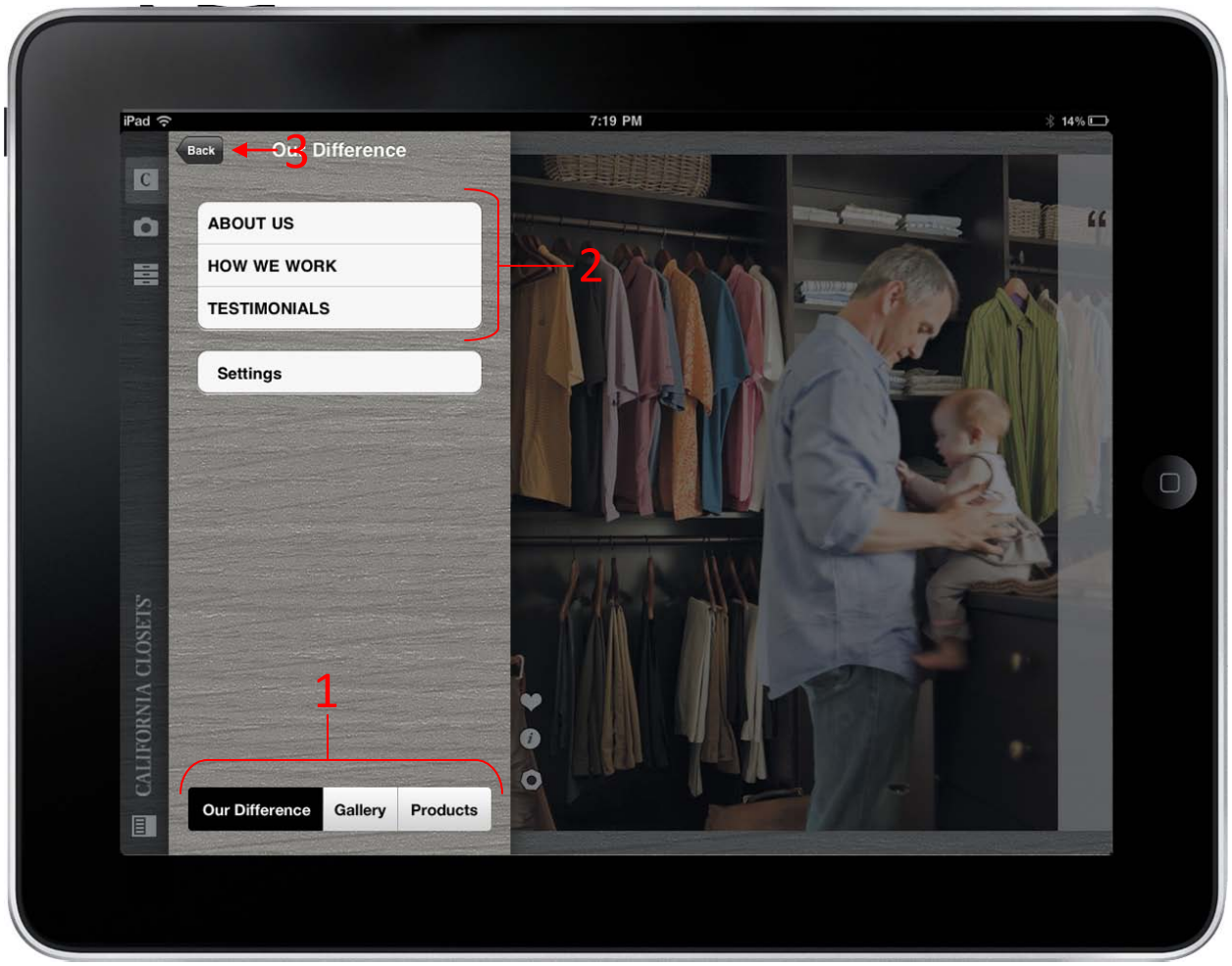
6. Tap once anywhere on the image to bring up the filmstrip navigation.

iPad
5:40 PM
39%
CALIFORNIA CLOSETS
THE LEE FAMILY
"We set out to have functional, beautiful closets that could be designed and installed on time in the midst of a complex project. And it was important they could keep with the rest of the house in terms of look and quality and sustainability. We certainly accomplished all And more."
7
8
9
10

7. Swipe the thumbnails to the left and right to see other images in the collection.
8. You can use these two buttons to page between the images.
9. This icon will take you back to the top-level of the super-category you are in; in this case "Our Difference". Here, this is the same as tapping on the "C" icon in the main navigation.
10. Tap on any thumbnail to go directly to that image.

Quick Navigation

The Quick Navigation tool is intended for you to get to any collection in the app more quickly, with fewer of the 'wow' transitions.

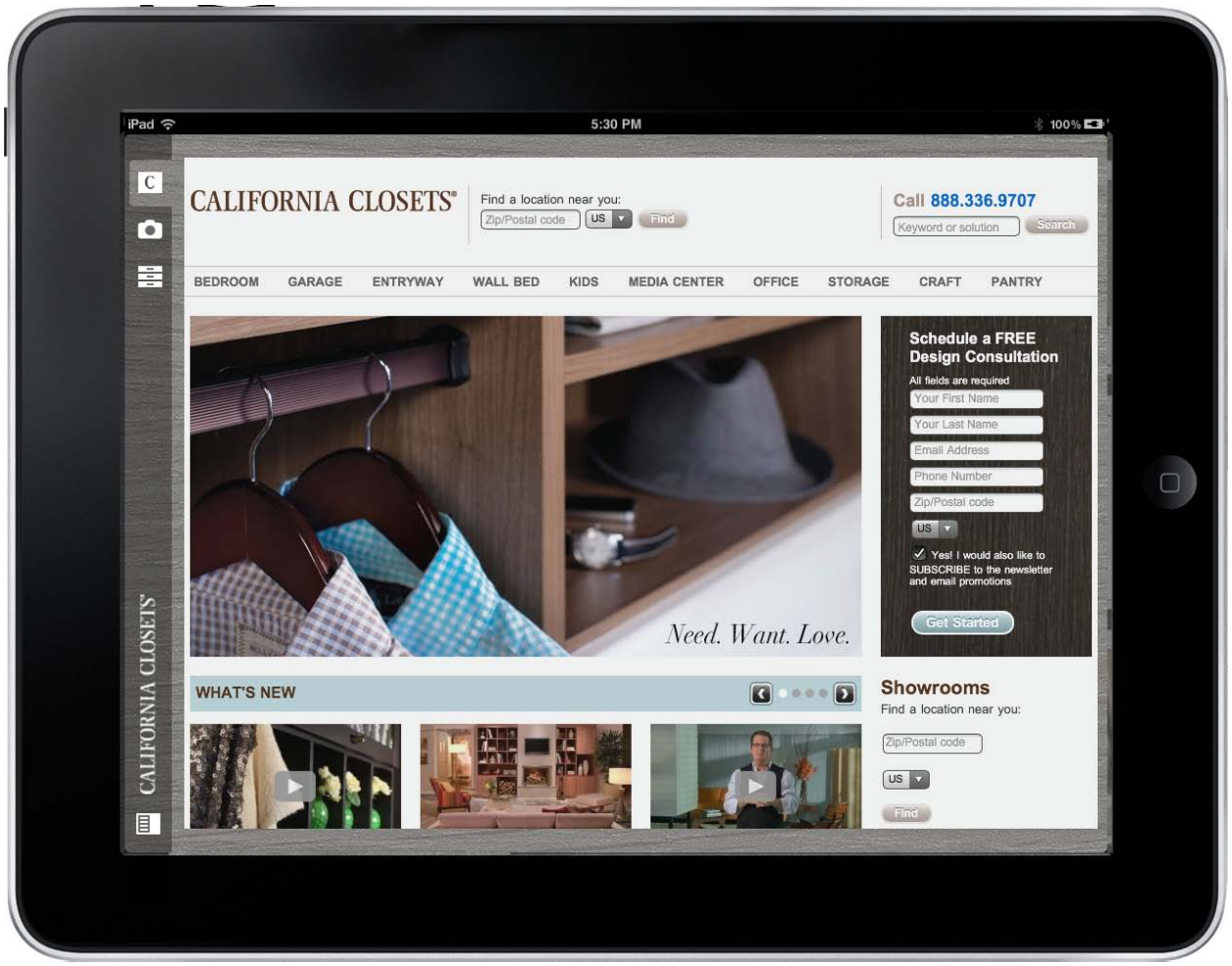


1. First, choose the super-category you want to navigate to.
2. Then use the list to navigate to the collection you want to see. You will eventually end up at the first page of the collection you choose and the Quick Navigation will close.
3. If you want to exit out of Quick Navigation without going to a new collection, click the "Back" button.

The Web Site

There is one special button in the 'Our Difference' super-category. The 'Website' collection launches the browser inside the app. Your franchise admin can set the page to which this opens for all of the iPads. To close the browser, tap a button on the left navigation.

iPad
4:52 PM
49%
ABOUT US
CALIFORNIA CLOSETS®
WEBSITE
SHOWROOM
SUSTAINABILITY
HOW WE WORK
CONSULTATION
INSTALLATION
CUSTOMER SERVICE
TESTIMONIALS
THE LEE FAMILY
THE DAUG FAMILY
THE JANSSEN FAMILY
CALIFORNIA CLOSETS



Favorites

One of the most exciting features of the Digital Showroom app is “Favorites”. This enables you to ‘tag’ images that you and your client find interesting to save for later. As you and/or your client are browsing the images in the Digital Showroom, you can click on the ‘heart’ icon to add them to your favorites. When you do this, the ‘heart’ turns red. To remove the image from “Favorites”, tap on the ‘heart’ icon again and it will go back to white.

As you are adding images to “Favorites”, they will appear as the first category in the “Gallery” super-category with a blue caption. The thumbnail shown is the first image of the collection which contains the tagged image. If you tap on the tagged image thumbnail, it will take you to that image directly.

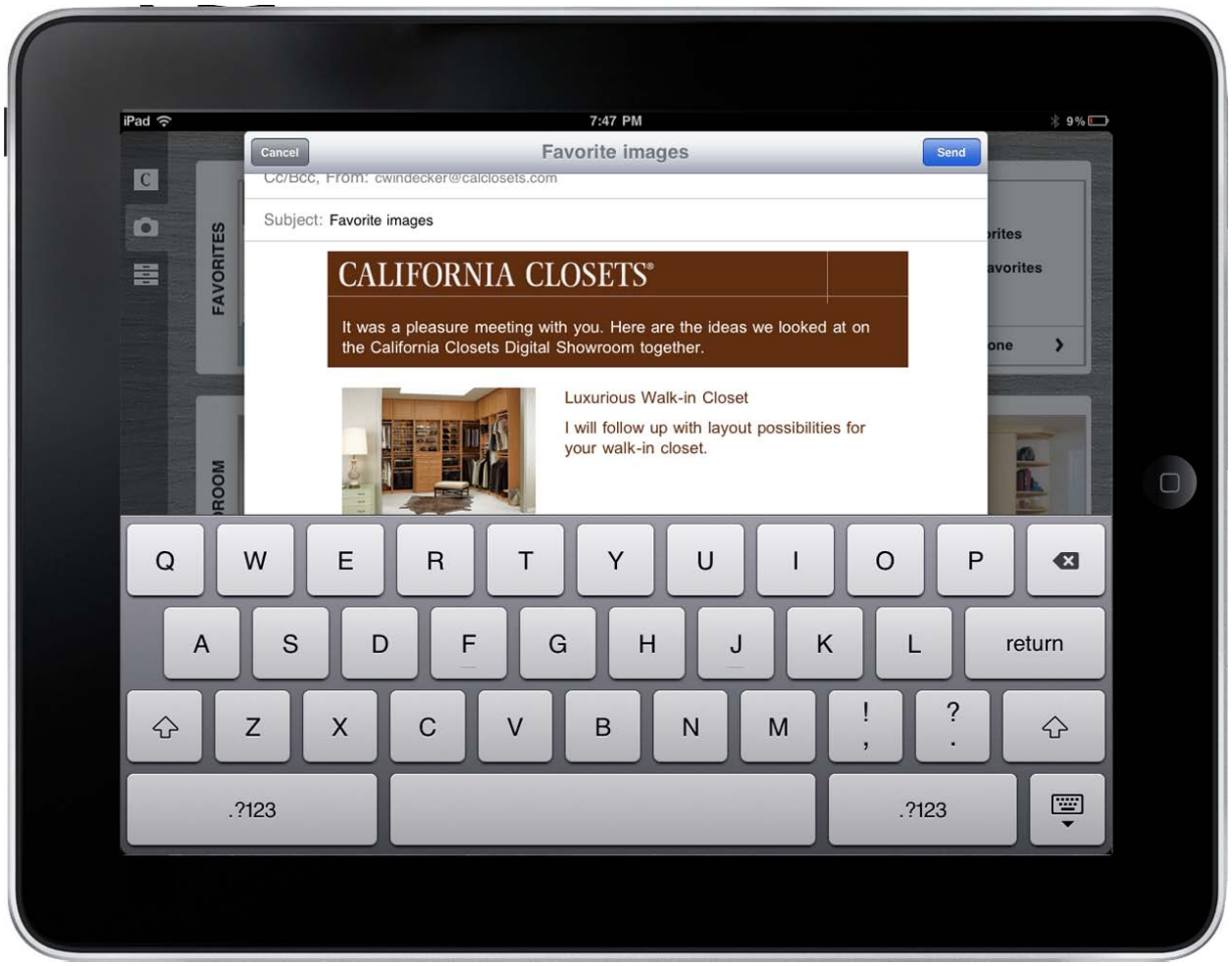
Once you've finished tagging images that you are interested in, swipe the "Favorites" to the right end and tap on "Edit Favorites".

Here you have the choice of emailing the “Favorites” or clearing them out. Click on “Email Favorites” to open an email window with the images that you tagged.

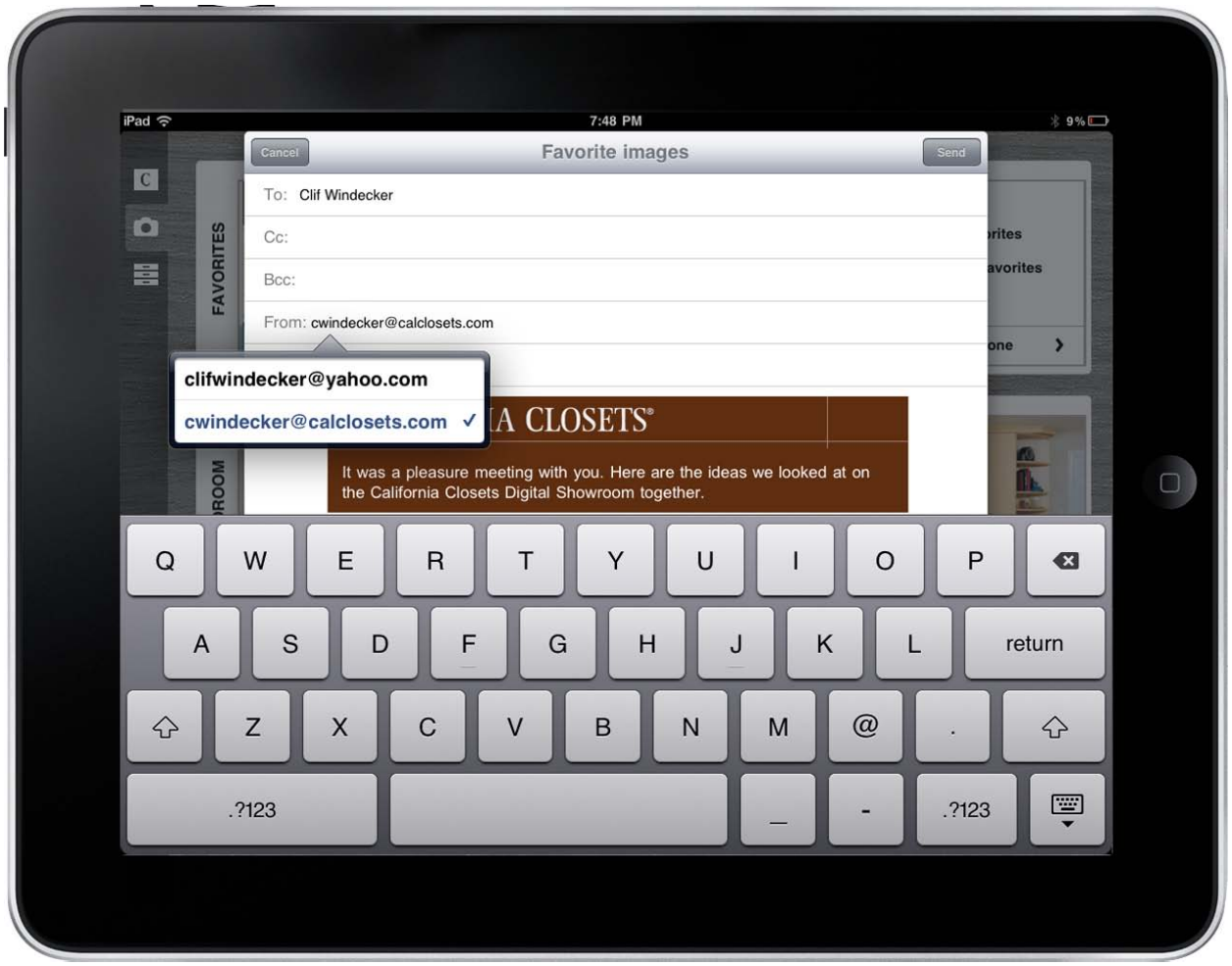
iPad
7:45 PM
10%
Cancel
Favorite images
Send
To: Clif Windecker
Cc/Bcc, From: cwindecker@calclosets.com
Subject: Favorite images
CALIFORNIA CLOSETS®
It was a pleasure meeting with you. Here are the ideas we looked at on the California Closets Digital Showroom together.
Luxurious Walk-in Closet
Luxurious walk-in closet system with angled shoe rails, accessory drawers, and decorative door and drawer faces and trim
Lago® Milano Grey
Matte Nickel Fluted Pull
Matte nickel finished zinc diecast pull.
FAVORITES
BEDROOM
KIDS
CALIFORNIA CLOSETS

This email has all of the images that you tagged. If you have tagged a lot of images, it may take a moment or two for all of the images to show up.

You can edit all of the text in this email directly here on the iPad, or you can send it to yourself and edit it within Outlook or any other email program, if you want to attach other files or use other editing tools.

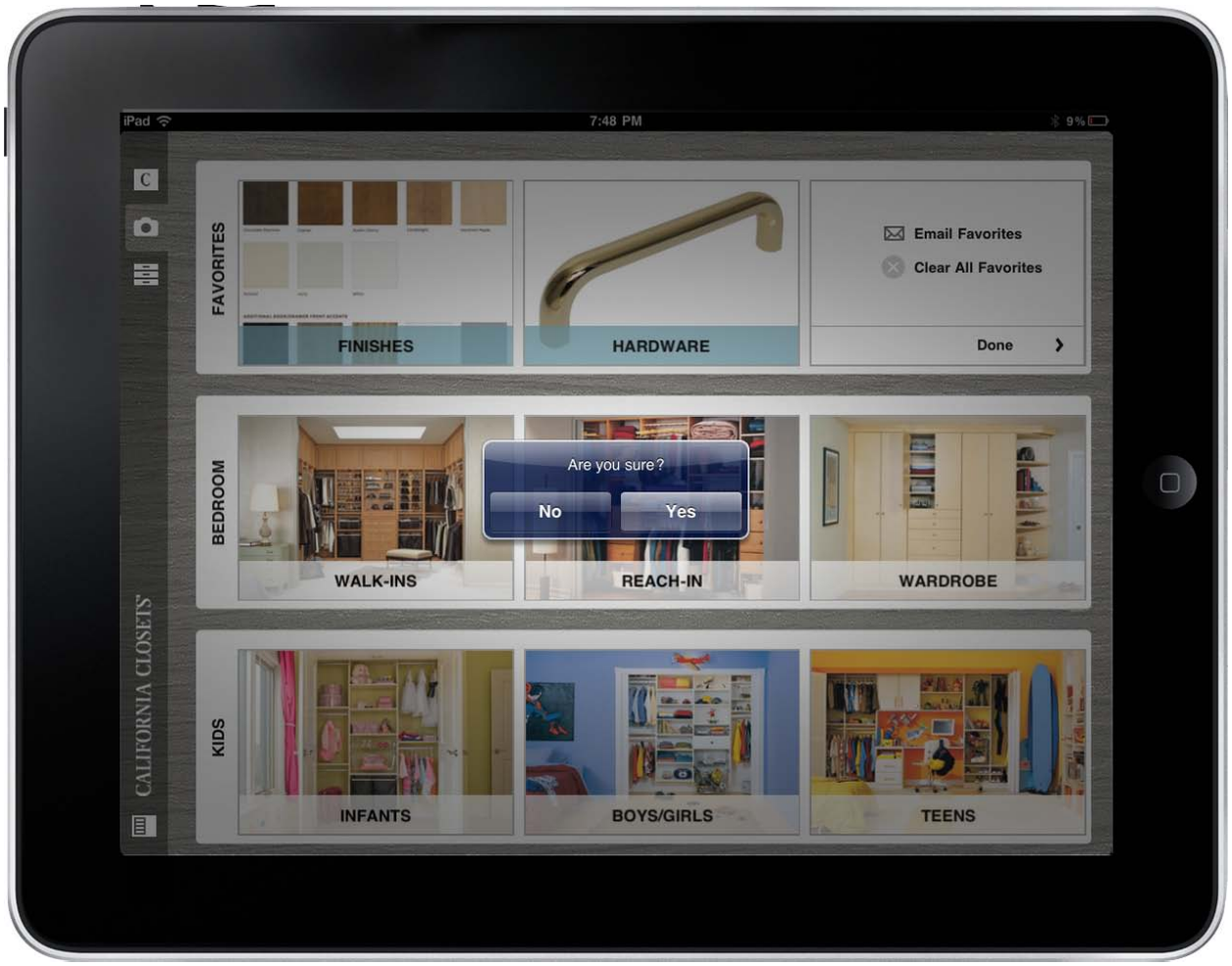

iPad
7:47 PM
9%
Cancel
Favorite images
Send
Cc/Bcc, From: cwindecker@calclosets.com
Subject: Favorite images
CALIFORNIA CLOSETS®
It was a pleasure meeting with you. Here are the ideas we looked at on the California Closets Digital Showroom together.
Luxurious Walk-in Closet
I will follow up with layout possibilities for your walk-in closet.
FAVORITES
Q W E R T Y U I O P
A S D F G H J K L return
Z X C V B N M
.?123
.?123

By default, the email will be set up with your email in the “To:” field. You can change this to send the email directly to anyone else. If you have more than one email account set up on your iPad, the email will automatically choose one of the accounts to send this from. If you need to send it from another email account (work vs. personal), or add a CC recipient, click on the “Cc/Bcc, From:” field and change the appropriate fields.



When you have finished editing the email, tap the “Send” button. You can cancel as well if you do not want to send the email or save it as a draft. To edit a draft email, you will need to exit the Digital Showroom app and open the email app on your iPad.

When you are finished with the “Favorites” with a client, tap on “Edit Favorites” if you haven’t already and then “Clear All Favorites”. Tap “Yes” to confirm, and you are ready for the next client. If you don’t clear the Favorites, they will remain the next time you open the app.

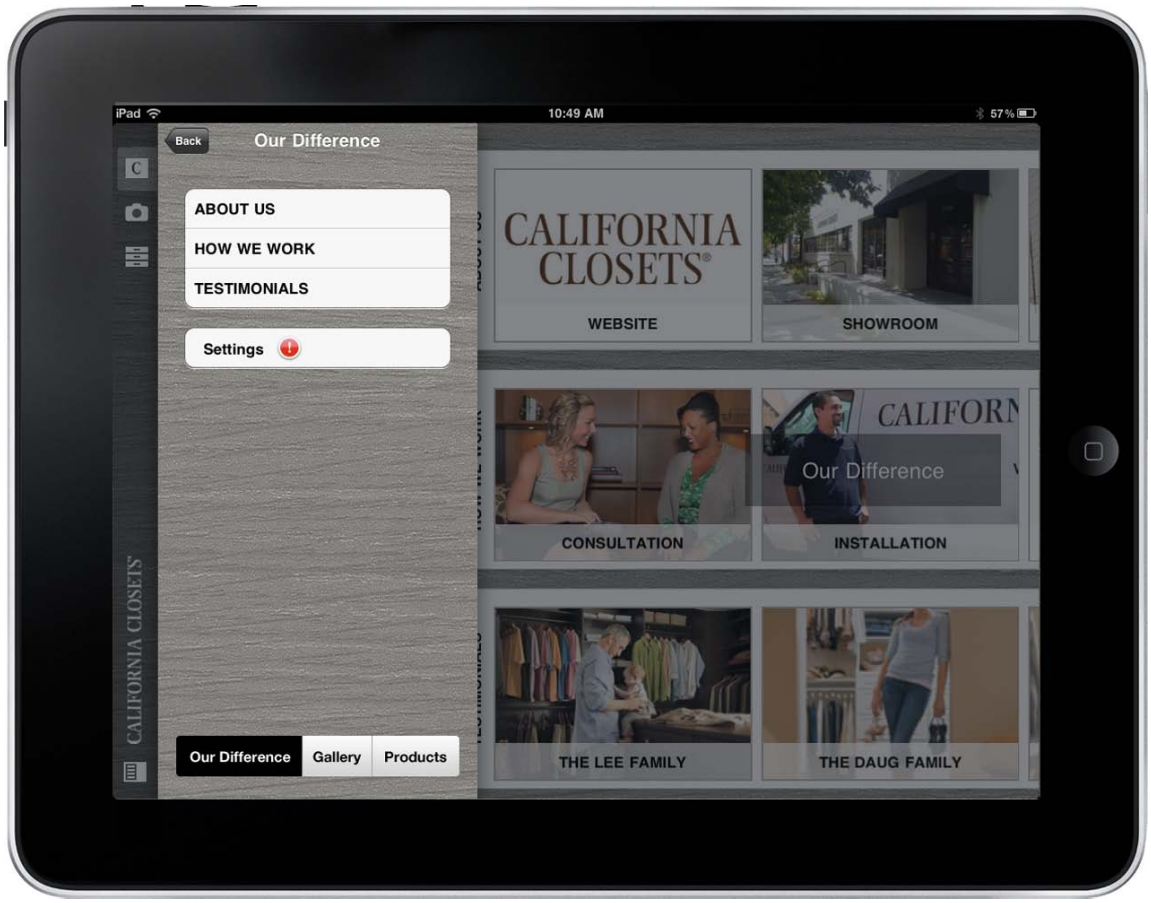


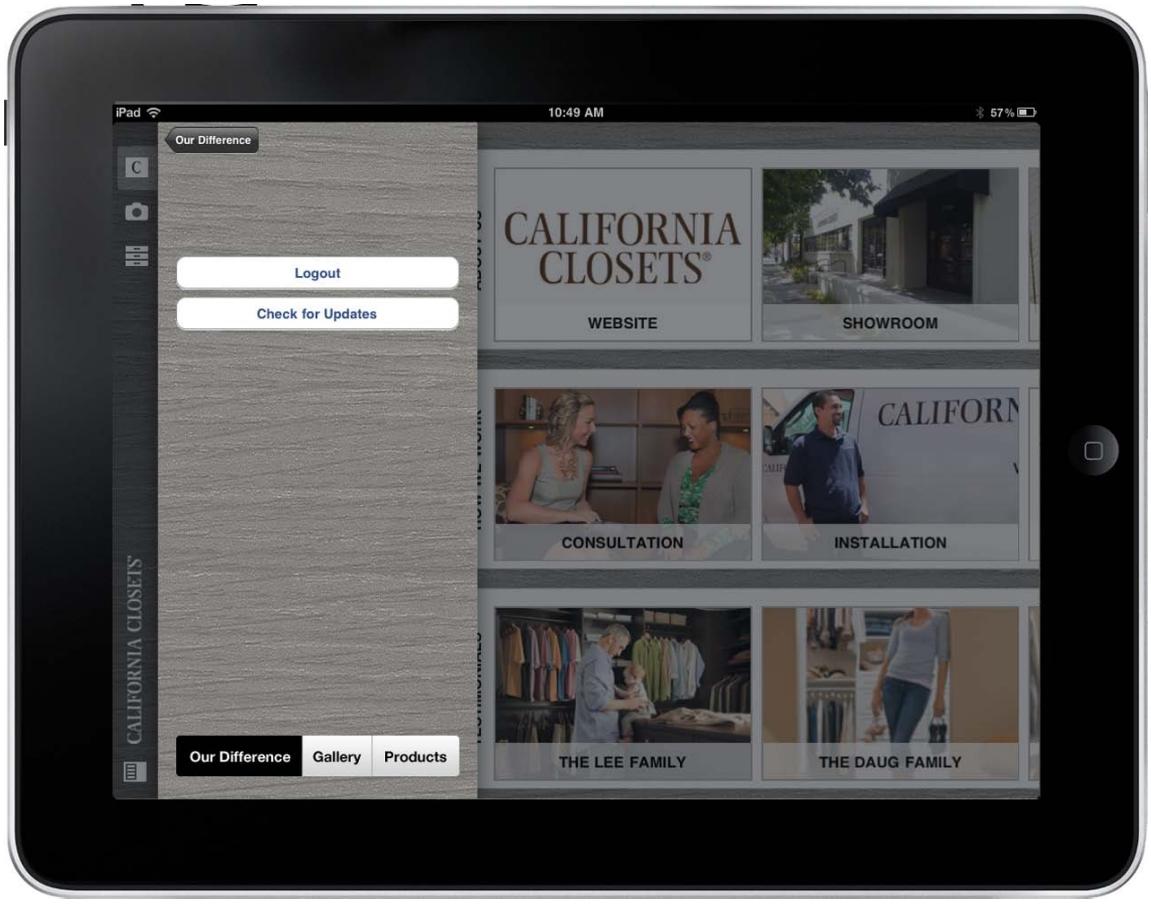
Updates

As the Digital Showroom admin for your franchise adds images to the content, you will get notices that updates are available. When you open the Digital Showroom app, if you are connected to the network, it will check to see if there is an update. If it finds there is an update, it will notify you and ask if you want to update at that time.

Tapping on 'Yes' will start the download immediately. You can, however, opt to do the update later by tapping on 'No'. It will remind you the first time you open the Digital Showroom app after one day, and also show that there is an update on the app icon on the main iPad screen. Keep in mind – it may take quite a bit of time based on the number of images the app needs to update. It is best not to start an update at a client's home prior to presentation.

When you are ready to download the update, you can start it manually by tapping on the 'Quick Navigation' icon on the bottom of the main navigation bar on the left, then tapping on 'Settings' and then 'Check for updates'. It will ask you again if you want to update, so tap on 'Yes'. The update will start. Once it is finished, the gray 'Downloading…' box will close and you are all set. If the update is interrupted for any reason, the Digital Showroom app will perform as if you had not updated and will work normally, and you can try the update at a later time.


iPad
10:49 AM
57%
Back
Our Difference
ABOUT US
HOW WE WORK
TESTIMONIALS
Settings
Our Difference
Gallery
Products
CALIFORNIA CLOSETS
WEBSITE
SHOWROOM
CONSULTATION
INSTALLATION
Our Difference
THE LEE FAMILY
THE DAUG FAMILY


iPad
10:49 AM
57%
Our Difference
Logout
Check for Updates
Our Difference
Gallery
Products
CALIFORNIA CLOSETS
WEBSITE
SHOWROOM
CONSULTATION
INSTALLATION
THE LEE FAMILY
THE DAUG FAMILY

Using the Digital Showroom to its Potential.

The desired outcome in distributing Digital Showroom to the system is that the franchises, as well as the sales people in the field, have a full understanding of what the app can offer as a sales tool and how and when to utilize it in the most effective manner. The value and benefits to the franchise, Design Consultant and client will be missed if Digital Showroom is used simply as a way to show stock product images by the Design Consultant.

As outlined in the Admin Manual each franchise has the opportunity to add their specific content to the app. This content should include local franchise information, current promotions, local product and showroom images, and Design Consultant portfolios to name a few. The more franchise specific content that is added the more likely the Design Consultant will utilize Digital Showroom effectively and ultimately give the client a unique and collaborative experience.

The following recommendations for using Digital Showroom are in relation to the Facilitative Sales process (for additional information on Facilitative Sales, please refer to the complete model and notes on CC Dashboard):

Prepare for Success

- All Design Consultant's trained on and comfortable with the functionality and content of the Digital Showroom
- iPad screen should be clean and charged, fully updated, favorites cleared
- Send a pre-appt email with applicable images from intro call
    - MSDS (material safety data sheet),
    - How we work
    - Licensing
    - Installation images
- Download notepad app such as Ghostwriter to use in lieu of paper

* It is critical for the admin manager to keep all content relevant and send out updates as needed.

Rapport Building

- Discuss that you will be using the iPad when setting the agenda
- Introduce the functionality of the iPad and highlight the various icons and how they navigate through the app
- Review Consultation Gallery
- Testimonials
- Individual Design Consultant portfolio

* Discuss use of the Digital Showroom on confirmation call. Use the Digital Showroom to introduce galleries, testimonials, and Design Consultant portfolios during interview process at kitchen table. Design Consultant should start compiling 'Favorites' list.

Decision Process

The iPad application should provide supporting documentation for items that are uncovered and discussed during the Decision Process. This is a summary of some of those areas:

- Timing: technical specs on lead times for product options can be included in the information icon
- Internal options: displaying difference between what they've tried and how our options are more efficient
- Price: establish alignment on the aesthetic that is within their budget
    - Show embellishments v. simple solutions
- External: our difference
    - Testimonials, warranty, our NPS program, installation gallery, exclusive finishes and accents, showrooms, sustainability, Professional Partnership Program (for builders, architects, etc.)
- Decision maker: emailing 'Favorites' directly to other decision maker(s)
- Other projects:
    - Indicate images that identify another project that we may be able to service
    - Showcase testimonials and customer service slides that differentiate us from other in-home services

* Use of Digital Showroom during the interview should be done at kitchen table when applicable. It may be appropriate for you and your client to use the app at this stage. Design Consultant should continue to compile 'Favorites' list.

Company Awareness

The 'Our Difference' is the first icon within the iPad app so that you can utilize the various galleries to provide differentiation to your client. This will include the following:

- Website, Showrooms (location and images), consultation gallery, installation gallery, technical specifications, NPS program, warranty, MSDS (material safety data sheet), sustainability program (LEED), upcoming events and community interaction, licensing, insurance and bonding, resale, transfer of warranty, industry affiliations, etc.

* Ask the client what they would like to know about California Closets. Use the 'Our Difference' super category during this step. Continue to capture new 'Favorites'.

Needs Discovery

- Use Gallery and Products to indicate design applications, engineering options, finish options, add to 'Favorites' list
- Identify images that are specific to eccentric collections
- Indicate different sizes of standards components and their storage capacities
- Show Design Consultant portfolio of personal work completed locally

* Design Consultant will most likely take the lead to find relevant images and then hand iPad to client for validation. In addition, prompt client to different galleries and inquire about other possible spaces to look at. Capture any new 'Favorites'.

Accurate Measures

- Take pictures with your iPad (iPad2 has camera feature) for before and after, detail obstructions and client inventory.

* After taking pictures with iPad. Hand back to client to allow for further inspiration from our offerings. Capture any new 'Favorites'. These pictures can also be used within fulfillment period to assist in moving a pending job to 'sold'. See notes below.

Display Product and Design Concepts

- Relevant product galleries
- Design Consultant portfolios
- Showroom(s)

* Design Consultant to use with client to reinforce and validate product concepts. Capture relevant 'Favorites'.

Determine Best Manner to Proceed

- If not designing on spot sell benefits of 2nd appointment in showroom
- Email 'Favorites' as a follow-up to initial appointment and to confirm 2nd appointment location, date and time

* Design Consultant should pull up gallery of the local franchise showroom to create excitement and sell benefits of showroom visit.

Present Design, Price, Availability, Optional Services

- Slide for introducing benefits of any current promotion
- Tear-out policy discussed
    - Image of unrepaired tear-out v. clean prepped and painted closet "Ready for installation"

- Availability and timing of special-order products/items reinforced in tech specs on "Favorite" items
- Reinforce CAD design with appropriate images and tech specs

* Design Consultant to use Digital Showroom when appropriate during this step.

Ask for the Order

- Screen shot of Docusign to familiarize with digital signing page, tech specs on process
- Use 'Favorites' email to create a PDF of final selections and include Scope of Work portion of contract
    - Edit 'Favorites' email to include an inventory of accessories or manual items not visible in CAD

* Digital Showroom is used as a support tool at this stage. If used it should be by the Design Consultant.

Next Steps

- Local Showroom included in Favorites, hours, location and phone
- NPS program survey question, what it means, how it is measured
- Referral Slide, Professional Partnership Program discussed as appropriate

* Design Consultant to navigate to appropriate galleries.

Fulfillment Period

- Installation gallery showing process
- Warranty service

* Design Consultant to navigate to appropriate galleries. If you have taken photos of their 'before' closets, you can utilize these to send in an e-mail to pending clients to prompt them to move forward on their project. Otherwise, make sure to take 'after' photos and then send both 'before and after' to your client as a thank you post-installation and encourage them to share both photos with their friends and/or on their social networking sites such as Facebook. People get enthusiastic seeing the transformation and are very excited to share these with friends! This is an excellent opportunity to promote your PMP business by asking for referrals.

Other iPad Apps That May Facilitate Your Sales Process

As long as you have the iPad to work with on the consultation, there are many other apps that can help you work in the field and with your client. Here are a few suggestions to look at. You can find all of these in the App Store by searching on their names.

Penultimate

This app gives you the ability to take notes with your finger as the pen. Very handy for writing down measurements. You can email the notes once your done or have them visible on the iPad while you enter the measurements in to CAD.

Bamboo Paper

Similar to Penultimate, this app allows you to take notes with your finger, but you can also purchase a stylus that may give you finer control.

Dropbox

This app is part of a service that gives you the ability to easily transfer files between your iPad, your computer, and your iPhone. You will need to install Dropbox on all of the computers you want to transfer files between. Very easy to setup and use.

Docusign

Free (app). Once your franchise has signed up for this service, you can have your customers sign their contract directly on the iPad. More information can be found at http://www.docusign.com/.

Square

Free (app and swiper). Square is used for swiping credit cards through the iPad or iPhone. Talk to your franchise to see if this is an option. More information can be found at http://squareup.com.

Troubleshooting

You may encounter an blue error box during an update. If this should happen, tap on 'OK' to close the error box and try the update at least 30 minutes later. In the meantime the Digital Showroom app should function normally. If you continue getting the blue error box, let your franchise admin know.

If for any reason the Digital Showroom app behaves abnormally, please first try the following:

1. Click the 'Home' button so the main iPad screen is visible.
2. Double-Click the 'Home' button to show the list of running apps in a row on the bottom of the screen.
3. Press and hold on the Digital Showroom 'C' icon until all of the icons start 'shaking'.
4. Press on the red minus on the Digital Showroom 'C' icon.
5. Click the 'Home' button.
6. Click the 'Home' button, again.
7. Tap on the Digital Showroom 'C' to start the app again.
8. If the problem persists, contact your franchise admin and describe the problem.

If either of these solutions does not work, we can best research the solution with as much information about the problem you're seeing as possible. This includes:

1. Noting what you were doing at the time when you first noticed the problem.
2. What version of iPad you have (1 or 2)
3. What error message you are seeing
4. Screenshots of the problem

To take a screenshot on the iPad, hold the 'Home' button and press the Power button on the top of the iPad at the same time. You should see a white flash (like a flashbulb) and hear a camera shutter sound if you have the sound turned up. The screenshot will be placed in your photos and you can email that along with any of the above information to ipad@calclosets.com.